NFC
Procedures

National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture
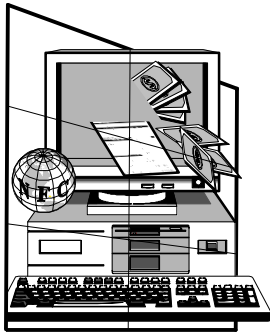
December 1999

W–2 System
WTWO

W–2 System (WTWO)

IMPORTANT INFORMATION !

This publication is an illustrated version of WTWO **online help**. Since the user can access and print online help directly from the application, online help is considered the primary source for information about WTWO.

When you print online help directly from the application, the format is different from this illustrated version; however, the text is the same. Therefore, NFC provides the illustrated version only upon customer request.

For information about this publication, please contact the Directives and Analysis Branch (DAB). Instructions for contacting DAB and other support sources are provided in the **About This Procedure** section of this publication.

User Survey
For
USDA/NFC Procedures

The Directives and Analysis Branch requests your comments on this procedure. To help us evaluate and improve the effectiveness of our publications, please answer the questions below.

Return the survey within 30 days to:

⌐   ¬

Directives and Analysis Branch
USDA/NFC
P.O. Box 60000
New Orleans, LA 70160–0001

Optional:

```
W-2 System (WTWO)
```

Procedure Name

```
 I   /   27   /          /
```
Title   Chapter   Section   Subsection

User Name   Phone No.

Job Title   Grade

Address

City   State   ZIP

1. How helpful is the procedure to you in performing your job?

☐ Very helpful

☐ Fairly helpful

☐ Not very helpful because _____

_____

_____

_____

2. Is the format easy to follow?

☐ Yes

☐ No, I suggest _____

_____

_____

3. Is the writing easy to understand?

☐ Yes

☐ No, I suggest _____

_____

_____

4. Are the instructions/exhibits clear and easy to follow?

☐ Yes

☐ No, I suggest _____

_____

_____

5. How frequently do you use the procedure?

☐ Daily

☐ Weekly

☐ Monthly

☐ Other: _____

_____

_____

6. Have you found any errors in the procedure?

☐ No

☐ Yes _____

_____

_____

7. What recommendations/comments would you like to make regarding this procedure?

_____

_____

_____

_____

_____

_____

_____

THANK YOU FOR COMPLETING THIS SURVEY!

Table Of Contents

About This Procedure

This procedure provides instructions for accessing and operating the W–2 System (WTWO). The following information will help you use the procedure more effectively and locate further assistance if needed.

How The Procedure Is Organized

The major sections of this procedure are described below:

Introduction presents an overview of WTWO including security access information and instructions for accessing the system. It also provides basic operational information including how to get help using WTWO.

Getting Started In WTWO provides instructions on how to access WTWO.

Searching, Viewing, And Printing W–2 Data provides step-by-step instructions for searching, viewing, and printing W–2 data.

Field Descriptions/Instructions For WTWO windows contains descriptions of or instructions for the fields on WTWO windows.

Reference Tables includes tables of valid values for completing the fields on WTWO windows.

Heading Index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

To keep you informed about new or changed information related to this system, NFC issues short publications called bulletins or amendments. This procedure and all related bulletins and amendments are listed in the NFC External Publications Index, issued semiannually. Also, the Bulletin Board on the NFC home page *(www.nfc.usda.gov)* provides a list of all bulletins by title and publication date. User's can choose to view and/or print bulletins from this Bulletin Board list.

If you receive this procedure after it has been amended, you will receive the publications with all amendments and bulletins. Remove and insert amended pages according to the accompanying page control chart so that your procedure is current.

What Conventions Are Used

This procedure uses the following visual aids to identify certain kinds of information:

Convention	Example	
Messages displayed by the system are printed in *italics*.		The message *No adjustment found for specified SSN* is displayed.
Important extra information is identified by a note, warning, caution, or reminder icon in the left margin.	☞ **Note**	At any time during the entry process you can access help by pressing **[F1]**.
Figure references link figures with the text. These references are printed in bold sans serif font.		The Logon pop-up (**Figure 1**) is displayed.
References to headings in the procedure are printed in the same font as figure references. **Note:** When a heading is referenced in the procedure, you can use the Heading Index to locate the page number.		For descriptions of the fields displayed on this pop-up, see **Additional W2 Fields Pop-up Field Instructions**.
References to menu options are printed in **bold italics**.		To change the sort of the employees listed, select **Sort > Sort by Last Name or Sort by SSN**.
References to command buttons or keyboard keys are printed in bold and enclosed in brackets.		To return to the previous window, click **[Close].**
		At any time during the entry process, you can get help with completing a field by pressing **[F1]**.
Field names are printed in the margin. Field specifications are printed in *italics*. **Note:** Field entries are identified as *required[1]*, *conditional[2]*, *optional[3]*, *optional default[4]*, or *no entry[5]*.	**Agency**	*No entry* The agency code of the employing agency.

[1]**Required**	You must enter data in the field. (Note: All mandatory fields on WTWO screens are highlighted to distinguish required entries from optional entries. The highlighted fields must be completed to avoid rejection.)
[2]**Conditional**	You may be required to enter data, based on criteria indicated in the field instructions.
[3]**Optional**	You may elect to enter data in the field. If the field is left blank, no data is system generated.
[4]**Optional default**	You may elect to enter data. If the field is left blank, the system generates a default entry.
[5]**No entry**	You do not enter data in the field. The field instruction states the reason for no entry.

Who To Contact For Help

For questions about the system (including help with unusual conditions), contact Customer Support personnel at **504–255–5230.**

For questions about NFC processing, contact the Payroll/Personnel Operations Section at **504–255–4630.**

For access to WTWO, contact your agency's ADP security officer.

For questions about this procedure, contact the Directives and Analysis Branch at **504–255–5322**.

Introduction

This section presents the following topics:

Overview

How W–2 Data Is Generated

Inquiries And Special Instructions

Agency/NFC Responsibilities

Access, Security, And Installation

Overview

The W–2 System (WTWO) is a Windows 95/NT/98 system designed, developed, and maintained by the National Finance Center (NFC). This system is used to view and print an employee's W–2, Wage And Tax Statement, data and/or W–2C, Statement of Corrected Income and Tax Amounts, data.

The W–2 is a statement from the employing organization showing wages and other compensation paid to the employee, and the Federal, state, and local taxes withheld for the tax year.

The tax year represents wages paid from January 1 through December 31 which usually includes Pay Period 25 of the previous year through Pay Period 24 of the current year. For newly implemented agencies, the tax year begins with the pay period the agency is implemented into the Payroll/Personnel System.

The W–2 is printed as a single sheet that can be separated at the perforation to facilitate the filing of Federal, state, and local tax returns. Each employee is furnished a W–2, which includes four parts to be used by the employee as follows:

Copy B	To be filed with the employee's Federal tax return
Copy C	For the employee's records
Copy S–1	To be filed with the employee's state or local tax return
Copy S–2	Same as S–1, above.

The original W–2 is mailed to the employee's residence address recorded in the Payroll/Personnel database.

Note Casual Time Employees (CETR) W–2's are mailed to the employee's residence address. If the employee's residence address is not available, the W–2 is mailed to the employing personnel office.

When an employee works for more than one department (serviced by NFC), WTWO displays the cumulative tax data for both departments under the current department. NFC combines the tax data and issues one W–2. For a list of departments that are currently provided W–2's by NFC, see **Departments Provided W–2's By NFC Table**.

WTWO displays the last tax year's W–2 information. All W–2 information is purged in late December of the following year and replaced with the current tax year's W–2 information in early January. For example, W–2 information for tax year 1998 is purged in December 1999. The tax information for tax year 1999 is available for viewing in January 2000 after 1998 data is purged.

The W–2 for employees separated one or more times during the tax year will include the total wages paid for all periods of employment.

The amount of state tax withheld for each state in which an employee worked or resided during the tax year is shown separately on the W–2. Earnings in each state or moving allowances for each state are not shown separately.

Note Employees and residents of Missouri and Kansas who worked or resided in more than one state automatically receive separate statements of earnings or moving allowances, by state, at the end of January. All others are furnished this data on request only. Employees must determine the state(s) to which allowances should be allocated.

The amount of tax withheld for each city and/or county is shown separately on the W–2. Earnings by city and/or county are furnished on request only.

Note For information on inquiries and special requests, see **Inquiries and Special Instructions**.

W–2 records that reject to a suspense file or that are placed on hold by NFC will not display in WTWO. These W–2's are displayed once the discrepancy is resolved.

If a discrepancy exists for a W–2 that has been issued, NFC will produce a corrected W–2 (W–2C). The W–2C, Statement of Corrected Income and Tax Amounts, is a correction of data issued on the original regular or CETR W–2. Both the W–2C and original W–2 are displayed in WTWO.

Note The W–2C and the original W–2 must be filed together with the employee's income tax return.

How W–2 Data Is Generated

The data displayed in WTWO is generated from data processed in the Payroll/Personnel System, Statement of Earnings and Leave System (EARN), Special Payments Processing System (SPPS), Travel System, Casual Employee Time Report System (CETR), and the Administrative Billings and Collections System (ABCO).

Personnel Data. This data includes the employee's name, address, and salary. Personnel actions are entered through NFC's entry systems, or transmitted through a Front-End System Interface (FESI), and then applied to the Payroll/Personnel database.

Payroll Data. This data includes miscellaneous deductions, taxes, retirement, social security, allowances, and health and life insurance. Payroll actions are entered through NFC's entry systems, or transmitted through Employee Express (EEX) or a FESI, and then applied to the Payroll/Personnel database. Payroll data (payroll deductions and salary) is updated in the Payroll/Personnel System each pay period.

T&A Data. This data includes the number of hours worked each pay period, leave earned and used, and allowance and differential entitlements. Transaction codes (TC) are used on the Time and Attendance Report (T&A) to record the number of hours worked, leave used and earned, and allowance and differential entitlements. T&A data is prepared, certified, and electronically transmitted to NFC from agency locations. The T&A is then processed and edited through the T&A Validation System (TIME) and the data is applied to the Payroll/Personnel database.

EARN. This data includes the payroll/personnel and T&A data that is processed through the Payroll Processing System (PAYE). EARN prints the E&L statement for mailing to employees each pay period. It also maintains year-to-date totals for the current tax year and feeds this data to WTWO each pay period to produce a W–2 for a regular employee at the end of the tax year.

Travel Data. This data includes relocation expenses (moving allowance) that an employee has incurred for the current tax year. Both the amount subject to tax withholding and the amount not subject to tax withholding are included on the employee's W–2 and is identified as moving allowance. Also included on the W–2 and identified as moving expenses are payments of the Relocation Income Tax (RIT) Allowance. Moving expense payments are processed in the Travel System (TRAV). TRAV feeds taxable and non-taxable moving allowance reimbursements to WTWO on a monthly basis.

☞ **Note** W–2's are issued to Department of Education employees who have had moving allowances during the period January 1 through December 31 of the tax year. These W–2's are mailed to the Department of Education.

CETR Data. This data is used to pay and record wages for persons hired for casual time employment due to sudden and unexpected emergency caused by a fire, flood, earthquake, hurricane, or any other emergency, actual or potential, that threatens damage to Federally protected property. CETR provides the WTWO at the end of the tax year with the amount that was paid to these causal time employees to produce a W–2. This data is accumulated and updated at the end of the tax year. A W–2 for a CETR employee is produced from this data.

SPPS Data. This data is used to record indebtedness for a separated employee and process the final payment due the employee. SPPS feeds WTWO the adjusted wages and taxes for indebted employees if the payments are not made in the year the employee separates.

ABCO Data. This data includes any unpaid amount the employee owes on a debt to the Government. ABCO provides the WTWO at the end of the tax year with the amount that is unpaid for any debt that is owed to the Government. The unpaid amount is added to the gross wages as taxable income.

Inquiries And Special Instructions

Inquiries and requests for information concerning W–2's, except those requiring special handling, are entered in the Document Tracking System (DOTSE). For more information on DOTSE, see **Title I, Chapter 18, Payroll/Personnel Manual, Document Tracking System.** Requests that require attached documentation must be submitted manually to NFC on Form AD–354, Request for Information. The request must **include the employee's social**

security number, name, and address. If the employee was paid under an incorrect social security number for any part of the year, that number must also be included. A description of the types of inquiries and special requests follow:

- Some employees may not receive W–2's when they are initially mailed. It may have been determined that these W–2's require adjustments. The appropriate adjustments are completed by the end of January following the end of the tax year, and the W–2's are sent to the employees at that time. Notices of nonreceipt or requests for duplicate W–2's should be made to the Payroll/Personnel Operations Section using DOTSE.

- If the employee's name or address is stated incorrectly on the W–2, correct the information on the W–2 and inform the personnel office so that the proper documents are submitted in a timely manner for correction of the employee's name or address in the Payroll/Personnel System. The employee should not request a corrected W–2 if the name or address is stated incorrectly on the W–2. However, a corrected W–2 should be requested if the social security number is in error.

- An employee who believes that the W–2 is incorrect for reasons other than an incorrect name or address should discuss the matter with appropriate agency or department personnel before requesting a corrected W–2. If, after this consultation, it is determined that a corrected W–2 is needed, submit a request explaining the discrepancy. If a corrected W–2 is required, a W–2C, Statement of Corrected Income and Tax Amounts, is issued to the employee. A W–2C corrects only the areas of the original W–2 that are in error.

Note
The W–2C and the original W–2 must be filed together with the employee's income tax return.

- If a breakdown of earnings or moving allowance by state/city/county is needed by the employee, the personnel office should submit a request for a breakdown. Upon receipt of the request, a statement (not a W–2) will be furnished showing earnings by state/city/county or moving allowance by state, according to the official duty station to which the employee was assigned.

- If additional S–1 or S–2 copies of the W–2 are required for state tax or local tax returns, employees should submit photocopies, if such are acceptable, to the states or localities. If photocopies are not acceptable by the state or local entity, indicate the number of copies needed in the request.

Agency/NFC Responsibilities

Listed below are the responsibilities of the primary organizations involved in data processing and system maintenance.

The agency:
- Enters, transmits, and corrects transactions.

- Personnel office communicates with timekeepers and other applicable staff when processing transactions that affect time and attendance, positions, etc.

- Uses NFC procedures and online help as needed, to assist in entering and correcting transactions.

The National Finance Center:

- Provides adequate security to prevent access from unauthorized personnel.

- Accepts payroll and personnel transactions from agencies for processing in the Payroll/Personnel System.

- Provides agencies with the capability to view and modify payroll and personnel transactions that have been transmitted.

- Maintains suspense transactions in the database until they have been corrected or deleted.

- Applies all successfully processed transactions to the Payroll/Personnel database.

- Provides help screen text to assist users in operating the system, entering data, and correcting suspense.

- Provides reporting capabilities either on demand or automatically.

- Develops regularly scheduled back-ups and recovery procedures.

- Provides documentation of the system.

Access, Security, And Installation

Security is designed to prevent the unauthorized use of systems and databases. For security information, including user identification numbers (user ID's), passwords, and obtaining access to a specific system, see the Security Access procedure, Title VI, Chapter 1, Section 1.

For more information, see:

Requesting Access To WTWO

Database Security

Installation

Requesting Access To WTWO

To access WTWO, you must:

- Use a personal computer and a secured telecommunications link to NFC.

- Have authorized security clearance.

For information about connecting and disconnecting from your telecommunications network, see the instructions that are provided with your specific network.

Users must request access through their agency's security officer. The request should provide the following information:

- User name

- User social security number

- User ID

- Agency name

- User access request level (payroll/personnel)

- SAC definition

- Telephone number

- Application name (WTWO)

The access level requested for the user should be based on the individual's assigned work requirements and job functions.

Database Security

The following information describes the security environment at NFC:

Security Software. System security at NFC is managed by CA TOP SECRET, a commercial access control package operated in an Operating System (OS) 390 environment. CA TOP SECRET provides protection for datasets, library programs, input/output devices, and most system resources. It also controls access to data processing resources and facilitates through a 3-step process as follows:

1. CA TOP SECRET validates the user to determine if he/she is authorized to use WTWO. The user's logon access (user ID and password) is validated during the logon process.

2. CA TOP SECRET confirms that the user is authorized to use the requested facility.

3. CA TOP SECRET determines if the user is authorized to use the requested resources *(i.e., datasets, programs, transactions, database subschemas, DB2 resources, Security Access Code (SAC), etc.)*

Validation Process. To facilitate access to NFC maintained systems, significant interaction/interface among software packages is necessary to control access. The following steps occur during a logon to WTWO:

1. The individual is prompted to enter an ID, password, and server.

2. At the Application icon, the individual selects WTWO.

3. CA TOP SECRET validates the ID, password, and access authorization to WTWO.

4. Upon verification/validation of the ID and password, the individual is logged onto the NFC mainframe computer and into WTWO.

5. CA TOP SECRET is checked again to determine if the individual can access the DB2 resources controlled by TOP SECRET. CICS (Customer Information Control System) transactions are also checked. If the TOP SECRET permissions exist, then access is allowed.

6. The SAC is used to verify if access is to be granted to a particular record. The primary SAC entry path is:

SAC:W1DDAABBBBBBBB, where DD=Department, AA=Agency, BBBBBBBB=Organizational Structure

The secondary SAC entry path is:

SAC: W2DDAACCCC, where CCCC=Personnel Office Identifier (POI)

The SAC entry in the individual's TOP SECRET profiles is read to determine if the access should be allowed.

Installation

Instructions for installing WTWO are provided with the software. Be sure to read the hardware and software requirements to ensure that you have the proper equipment and adequate disk space for successful installation.

Getting Started In WTWO

This section presents the following topics:

Learning About WTWO

To use WTWO, you must have some knowledge of Microsoft Windows. Use your Windows user guide for navigating in a Windows environment.

WTWO offers online sources to help you learn about the software.

The online help feature is available to guide you as you process data in WTWO. To get help, click **[Help]** from the menu bar at any window. A drop-down menu is displayed with the following options:

- **Help for Help.** Describes Windows help.

- **Extended Help.** Detailed instructions (e.g., field specifications) abstracted from the WTWO procedure that can be used for viewing data generated from payroll and personnel transactions.

- **Keys Help.** Describes the tool buttons and function keys.

- **Help Index.** Includes an Index and a Find option. The index is a list of the various types of help where a selection can be made by category to display help text. Find enables you to search for specific words and phrases instead of searching by category.

- **About.** Describes the open window.

For online help, click ***Help > [help option]*** at a menu bar. For help with a specific field, click the field in question and press **[F1]**.

Starting WTWO

To start WTWO:

1. At your Windows desktop, select **Start > Programs > National Finance Center > NFC Logon**. The NFC Welcome banner (**Figure 1**) is displayed.
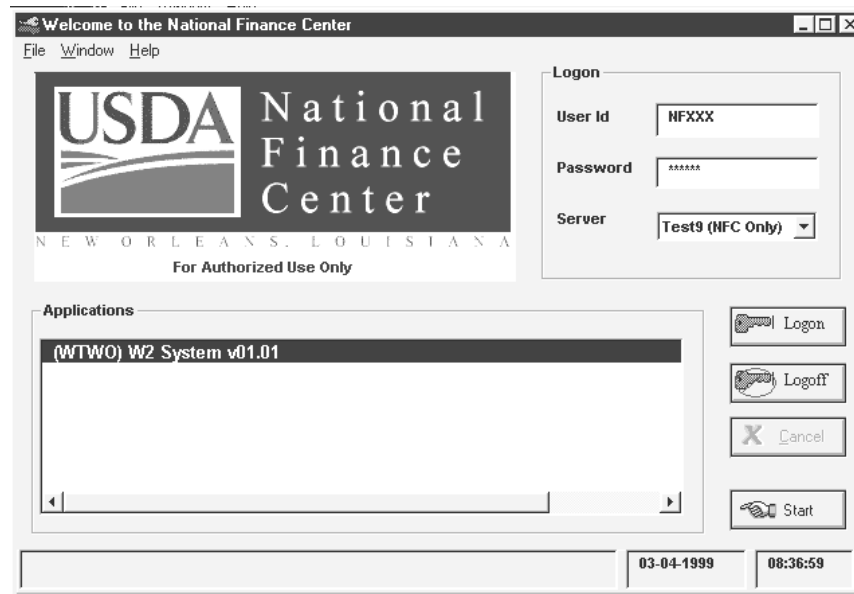
Figure 1. NFC Welcome banner

2. Complete the fields in the Logon area as indicated under **NFC Welcome Banner Field Instructions**.

3. Click **[Logon]**. A list of payroll/personnel applications is displayed.

4. Select **(WTWO) W–2 System v01.01** and click **[Start]**. The WTWO banner is displayed. For further instructions, see **The WTWO Banner Window**.

Note   You must use the current version of WTWO. If the current version is not installed, the WTWO banner window will not display. Instead, a message appears indicating access is denied and the current version must be installed. You cannot access the application nor can you use the prior version.

Changing Your Password

You may change your password at any time but not more than once a day. To change your password:

1. At the NFC Welcome banner, select **File > Change Password**. The Change Password pop-up (**Figure 2**) is displayed.
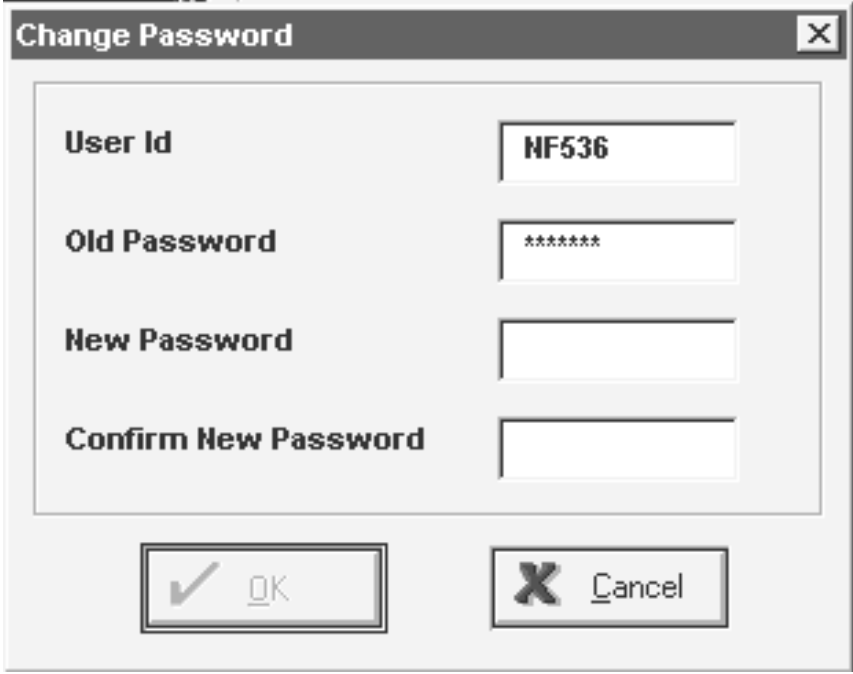
Figure 2. Change Password pop-up

2. Complete the fields as indicated under **Change Password Pop-up Field Instructions**.

3. Click **[OK]** to save the change and exit the window.

The WTWO Banner Window

After you start WTWO, the WTWO banner window (**Figure 3**) appears.
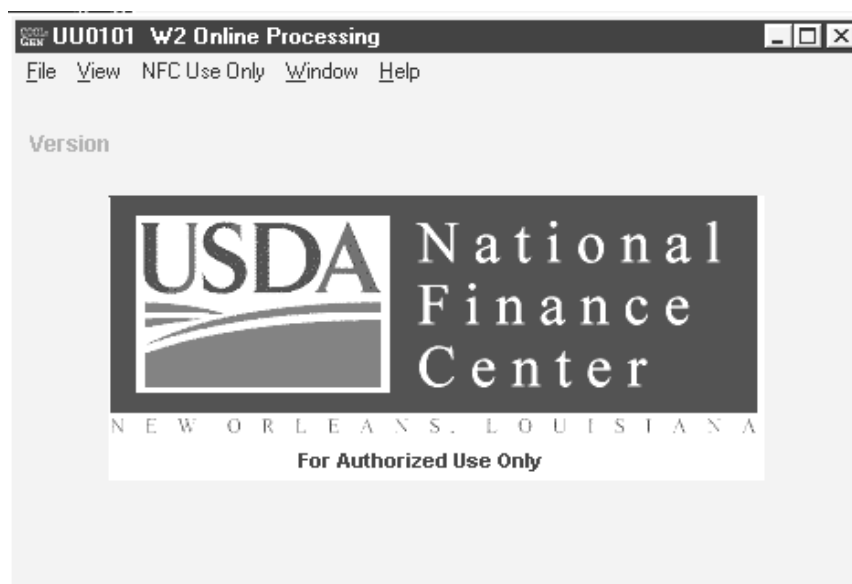
Figure 3. WTWO banner window

The menu bar on the WTWO banner window displays the following options and drop-down menus:

Menu Bar Option	Drop-down Menu Options	Description	Notes
File	Exit	Used to exit WTWO.	
View	Employee List	Used to search for a W–2 by the employee's last name or social security number (SSN).	
	W2 Inquiry	Used to search for a W–2 by the employee's SSN.	
	W2-C Inquiry	Used to search for a corrected W–2 by the employee's SSN.	
Window	Tile	Used to automatically resize all open windows and arrange them to fit next to each other on the desktop.	These are Microsoft Windows features. For more information, see your Windows user's guide or select *Help > Help For Help* at the WTWO menu bar.
	Cascade	Used to arrange all open windows in an overlapping format so that each title bar is visible.	
Help	Help For Help	Used to view instructions for using the Microsoft Windows help system.	For pop-ups, window-level help is available only if a Help button is on the pop-up. For more information, see **Using Online Help**.
	Extended Help	Used to view information about a specific Help topic.	
	Keys Help	Used to view information about program function keys.	
	Help Index	Used to view an alphabetic list of all Help topics available in WTWO.	
	About	Used to view information about the Help topics.	

For more about the menu bar, see **The WTWO Menu Bar**.

Exiting WTWO

To exit WTWO:

1. At any WTWO menu bar, click ⬛ to return to the WTWO banner window.

2. At the WTWO banner window, select *File > Exit* to exit WTWO and return to the NFC Welcome banner.

☞
Note
To disconnect from the NFC mainframe, click **[Logoff]** at the NFC Welcome banner.

Using Online Help

WTWO provides complete online documentation designed in a Microsoft Windows online help system. If you are not familiar with using Microsoft help systems, see a Windows user's

guide or select **Help > Help For Help** at the WTWO menu bar. When you need help with viewing WTWO data, click **Help** at any WTWO menu bar. A drop-down menu is displayed with the following options:

Option	Description
Help For Help	Provides instructions for using the Microsoft Windows help system.
Extended Help	Provides information about a specific Help topic.
Keys Help	Provides instructions for using program function keys.
Help Index	Provides an alphabetic list of all Help topics available in WTWO.
About	Provides information about the Help topics.

☞
Note

When you select **Help Contents**, the Welcome To WTWO Help window appears with information about how to use WTWO Help. At the help window menu bar, click **[Contents]**. The Help Topics table of contents (**Figure 4**) is displayed.
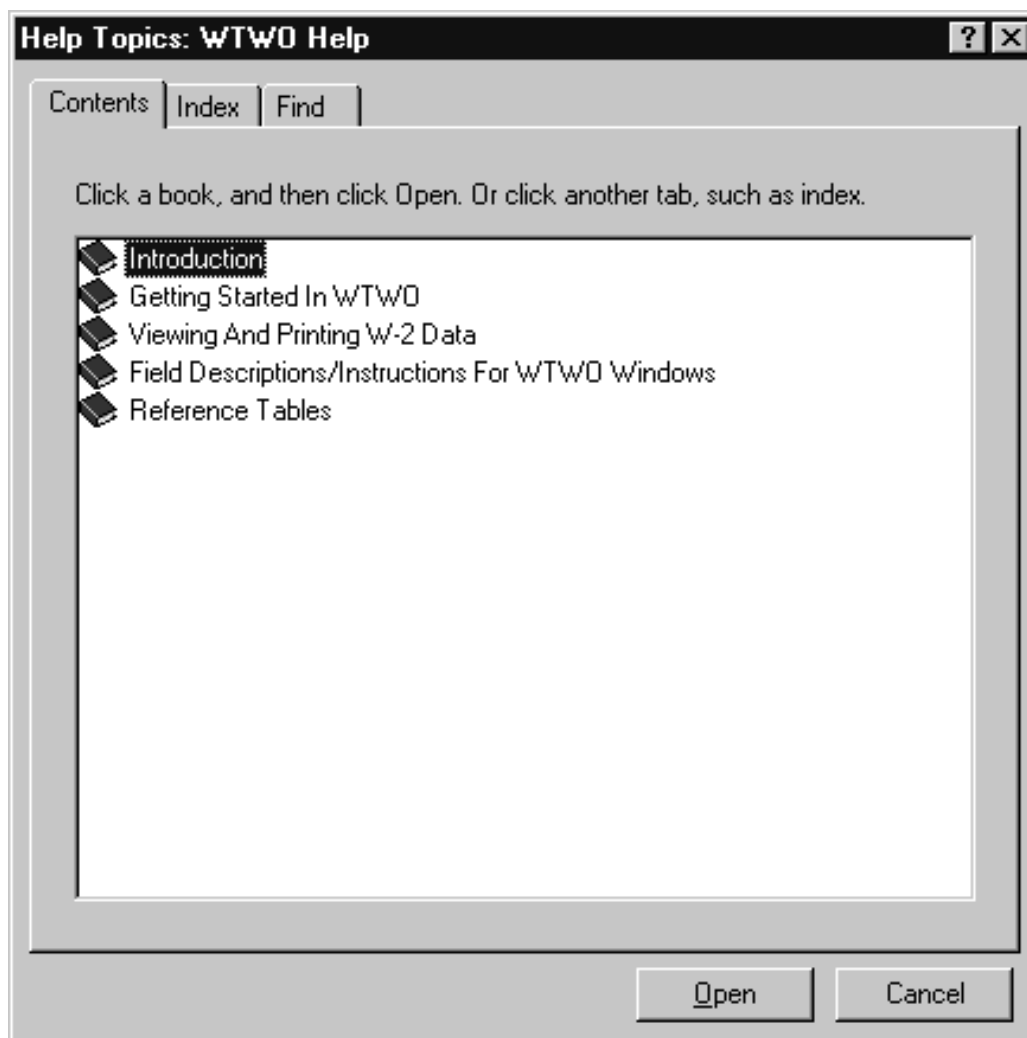
Figure 4. Help Topics table of contents

This window provides three ways to locate information:

Options	Description
Contents	Displays the table of contents for online documentation.
Index	Provides an index of key words.
Find	Provides word search capability.

For instructions on using these Microsoft help features, select **Help > Help For Help** at the menu bar on any WTWO window.

WTWO Operating Features

WTWO is designed in a windows format, providing mouse-driven, point-and-click functionality; menu bars; pull-down menus; tool buttons; and other windows features. This section reviews these basic windows features and describes others that are specific to the WTWO application.

Note Be sure to read **About This Procedure** to learn what visual aids are used throughout the documentation.

For more information, see:

The WTWO Menu Bar
The WTWO Toolbar
WTWO Pop-Up Windows
WTWO Functional/Directional Keys

The WTWO Menu Bar

The menu bar appears below the title bar on all WTWO windows except pop-ups. Each option on the menu bar displays options for viewing and/or processing transactions. When an option from the menu bar is selected, a **drop-down menu** appears, showing a list of options.
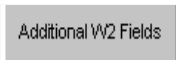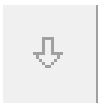
Note Options shown in gray are not available for use and do not respond to selection.

The WTWO Toolbar

The tool bar is a row of tool (icon) buttons located below the menu bar. Each tool button displays an icon that depicts its processing function. In most cases, the tool button can be used in lieu of the menu bar.

Tool buttons used throughout WTWO are shown in the following table. Those that are unique to a particular function are discussed under the topics where they apply.

WTWO Tool Buttons	
Button	**Description**
	Used to display search windows that display various types of search criteria used to locate data.

Used to print a window.

Used to save and edit data.

Used to display the W2 Inquiry window.

Used to display the Duty Station/Residence window.

Used to display the W2C Inquiry window.

Used to display the Employee Detail window.

Additional W2 Fields — Used to display the Additional W2 Fields window.

Used to display help text.

Used to scroll up.

Used to scroll down.

Used to exit a window or close a pop-up.

WTWO Pop-Up Windows

Pop-up windows do not have a menu bar or a tool bar; however, they do have command buttons that carry out an action implied in the button's name. WTWO pop-ups include the following command buttons used throughout WTWO:

WTWO Command Buttons

Button	Description
Find	Used to search for the data entered.
Cancel	Used to to cancel a command or close a pop-up.
? Help	Used to display help.
Yes	Used to confirm changes made to the Employee Detail window.
No	Used to not confirm changes made to the Employee Detail window.

WTWO Functional/Directional Keys

Your keyboard includes the following function keys that can be used in WTWO.

Function Keys

Key	Description
Enter	Used to accept/process data.
Delete	Used to delete data.
Tab	Used to move to the next field.
Space Bar	Used to create a space or tab to the next field.
→	Used to move to the next character within a field.
←	Used to move the previous character within a field.
F1	Used to display help.
F3	Used to close a window.
F7	Used to scroll backward.
F8	Used to scroll forward.

System Edits

All entries in the system are subject to front-end system edits. If an error occurs or if required data is omitted, a message is displayed in a pop-up window. All errors must be corrected before the system will respond to the requested action (e.g., *UEU1030001: WTWO Employee Not Found - Check Security Access And Verify SSN*).

Reporting

Ad hoc reporting using WTWO data is available through the FOCUS Reporting System. For more information on FOCUS reporting, see Title VI, Chapter 5, Section 4, FOCUS Reporting System.

Getting Started In WTWO

Searching, Viewing, And Printing W–2 Data

This section provides the following topics:

Searching For A W–2 Or W–2C (Corrected W–2)

You can search for a W–2 or W–2C (corrected W–2) from the WTWO banner window. You can also search for a W–2 from the W2 Inquiry window.

To search for a W–2 by the employee's SSN from the WTWO banner window:

1. At the WTWO banner window (**Figure 3**), select **View > W2 Inquiry**. The SSN – Search pop-up (**Figure 5**) appears.

Figure 5. SSN Search pop-up

2. Complete the fields as indicated under **SSN Search Pop-up Field Instructions**.

☞ **Note** At any time during the entry process, you can access help for a field by pressing **[F1]**.

3. Click **[Find]** to search for the specified data. The W2 Inquiry window (see **Figure 9**) appears for the data specified.

For descriptions of the fields displayed on this window, see **W2 Inquiry Window Field Descriptions**.

To search for a W–2 by the employee's SSN or name from the WTWO banner window:

1. At the WTWO banner window (**Figure 3**), select *View > Employee List.* The SSN/Name Search pop-up (**Figure 6**) appears.

UU0202 Search

Social Security Number: [ ]

OR

Last Name: [ ]

[Find] [Cancel]

Figure 6. SSN/Name Search pop-up

2. Complete the fields as indicated under **SSN/Name Search Pop-up Field Instructions**.

3. Click **[Find]**. The Employee List window (**Figure 7**) is displayed for the data specified. For descriptions of the fields displayed on this window, see **Employee List Window Field Descriptions**.

Figure 7. Employee List window

☞
Note

To change the sort of the employees listed, select *Sort > Sort by Last Name or Sort by SSN*. The window will display the sort that was requested.

4. Scroll to and highlight the appropriate employee's SSN.

5. Click $ to display the W2 Inquiry window (see **Figure 9**) for the data specified.

To search for a W–2C (corrected W–2) from the WTWO banner window

1. At the WTWO banner window (**Figure 3**), select **View > W2–C Inquiry**. The W2C Search pop-up (**Figure 8**) appears.

Figure 8. W2C Search pop-up

2. Complete the fields as indicated under **W2C Search Pop-up Field Instructions**.

3. Click **[Find]**. The W2C Inquiry window(see **Figure 11**) is displayed for the data specified. For descriptions of the fields displayed on this window, see **W2C Inquiry Window Field Descriptions**.

To search for a W–2 from the W2 Inquiry window

To search for a W–2 from the W2 Inquiry window:

1. At the W2 Inquiry window (see **Figure 9**), click ▥. The SSN Search pop-up (**Figure 5**) appears.

2. Follow the instructions under **To search for a W–2 by the employee's SSN from the WTWO banner window**.

Viewing A Regular Or CETR W–2

To view a regular or CETR W–2:

1. Use one of the methods described under **Searching For A W2 Or W–2C (Corrected W–2)** to display the W2 Inquiry window (**Figure 9**). Only tax data for the last tax year is available for viewing.

☞
Note
If an employee has regular wages and CETR wages in the same tax year, two separate W–2's are generated.

Figure 9. W2 Inquiry window

For descriptions of the fields displayed on this window, see **W2 Inquiry Window Field Descriptions**.

2. After viewing the data:

- • To display the Additional W2 Fields pop-up, click [Additional W2 Fields].

- • To display a corrected W–2, click [W2-C].

☞
Note
The W–2C field on the W2 Inquiry window must be marked to display the corrected W–2 information. If this field is blank, a corrected W–2 does not exist for the employee.

- • To display the Employee Detail window, click 👪.

- • To display the Duty Station Residence window, click 🏠.

- • To print the W2 Inquiry window, click 🖨.

- • To exit the window, click 🔲.

Viewing Additional W2 Fields

To view additional W2 fields:

1. At the W2 Inquiry window (see **Figure 9**), click [Additional W2 Fields]. The Additional W2 Fields pop-up (**Figure 10**) appears.

Searching, Viewing, And Printing W–2 Data

Figure 10. Additional W2 Fields pop-up

For descriptions of the fields displayed on this pop-up, see **Additional W2 Fields Pop-up Field Descriptions**.

2. Click 📇 to return to the previous window.

Viewing A W–2C (Corrected W–2)

To view a W–2C (corrected W–2):

1. Use the instructions described under **Searching For A W–2 Or W–2C (Corrected W–2)** to search for a corrected W–2 from the WTWO banner window, or click [w2c] on the

   W2 Inquiry window (**Figure 9**). The W2C Inquiry window (**Figure 11**) is displayed. If the employee has multiple corrected W–2's, the last corrected W–2, plus any previously corrected W–2 data, is displayed.

☞
Note
The W–2C field on the W2 Inquiry window must be marked to display the corrected W–2 information. If this field is blank, a corrected W–2 does not exist for the employee.

Figure 11. W2C Inquiry window

For descriptions of the fields displayed on this window, see **W2C Inquiry Window Field Descriptions**.

2. After viewing the data:

   - To print the W2C Inquiry window, click 🖨.

   - To display a corrected W–2 for a different employee, click 🔍.

☞ **Note**
The W–2C field on the W2 Inquiry window must be marked to display corrected W–2 information. If this field is blank, a corrected W–2 does not exist for the employee.

   - To exit the window, click 🔲.

Viewing Employee Detail Data

To view employee detail data:

1. At the W2 Inquiry menu bar (**Figure 9**), click 👥. The Employee Detail window (**Figure 12**) appears.

☞ **Note**
The fields on this window are generated from the Payroll/Personnel System.

Figure 12. Employee Detail window

For descriptions of the fields displayed on this window, see **Employee Detail Window Field Descriptions**.

2. After viewing the data:

Searching, Viewing, And Printing W–2 Data

- To print the Employee Detail window, click [printer icon].

- To search for a detail record for another employee, click [search icon].

- To exit the window, click [exit icon].

Viewing Duty Station And Residence Data

To view duty station and residence data:

1. At the W–2 Inquiry menu bar (**Figure 9**), click [icon]. The Duty Station Residence pop-up (**Figure 13**) appears.

Figure 13. Duty Station Residence pop-up

For descriptions of the fields displayed on this pop-up, see **Duty Station Residence Pop-up Field Descriptions**.

2. Click [icon] to return to the previous window.

Printing A W–2 Or Corrected W–2 (W–2C)

The print option is available to enable you to print a copy of a W–2 or corrected W–2 (W–2C). When the print option is selected for each form, the same print pop-up is displayed for each selection.

To print a W–2 or corrected W–2(W–2C):

1. Select **File > Print W2** at the W–2 Inquiry menu bar (**Figure 9**) or select **File > Print W2–C** at the W2C Inquiry window (**Figure 11**). The print pop-up (**Figure 14**) appears.

Figure 14. Print pop-up

2. Complete the appropriate fields to identify where and when to print the W–2.

3. Click **[Print]**.

4. After printing the form, do one of the following:

- To print another form, repeat the instructions listed above.

- Click **[Done]** to close the Print pop-up window and return to the previous window.

Field Descriptions/Instructions For WTWO Windows

This section presents the following topics:

NFC Welcome Banner Field Instructions

The NFC Welcome Banner (**Figure 1**) is used to logon to NFC applications. For more information, see **Starting WTWO**.

User ID
Required, alphanumeric, 5 - 8 positions
Type your user identification number.

Password
Required, alphanumeric, 6 – 8 positions
Type your unique password. If your password has expired, the Change Password pop-up (**Figure 2**) appears; click **[OK]** to close the pop-up. For instructions on changing your password, see **Changing Your Password**.

Server
Required, alphanumeric
Click [⬇] to display the drop down menu and select *[Payroll/Personnel]*.

Change Password Pop-up Field Instructions

The Change Password pop-up (**Figure 2**) is used to change your password. For more information on changing your password, see **Changing Your Password**.

User ID
Required, alphanumeric, 5 – 8 positions
Type your user identification number.

Old Password
Required, alphanumeric, 6 – 8 positions
Type your current password.

New Password
Required, alphanumeric, 6 – 8 positions
Type your new password.

Confirm New Password
Required, alphanumeric, 6 – 8 positions
Type the new password again to confirm it was entered as intended.

SSN Search Pop-up Field Instructions

The Search By SSN pop-up (UU0802) (**Figure 5**) is used to search for an employee's W–2 from the WTWO banner window or W2 Inquiry window when the employee's social security number is known. For instructions on this process, see **Searching For A W–2 Or W–2C (Corrected W–2)**.

Social Security Number

Required, numeric, 9 positions
Type the employee's social security number.

W2 Type

Required
Select one of the radio buttons to identify the type of W–2 as defined below.

`Regular`	A W–2 for a Regular employee
`CETR`	A W–2 for a casual time employee

SSN/Name Search Pop-up Field Instructions

The Search By SSN Or Name pop-up (UU0202) (**Figure 6**) is used to search for an employee's W–2 from the WTWO banner window when the employee's social security number is not known. For instructions on this process, see **Searching For A W–2 Or W–2C (Corrected W–2)**.

Social Security Number

Conditional, numeric, 9 positions
If the employee's social security number is known, type the employee's social security number.

OR

Name

Conditional, alpha, 17 positions max.
If the employee's social security number is not known, type the employee's last name.

Employee List Window Field Descriptions

The Employee List window (UU0201) (**Figure 7**) is used with the SSN/Name Search pop-up to search for an employee's W–2 when the social security number is not known. (For instructions on this search process, see **Searching For A W–2 Or W–2C (Corrected W–2)**.) The fields displayed on this window are described below.

SSN	*No entry* The employee's social security number.
Last Name	*No entry* The employee's last name.
First Name	*No entry* The employee's first name.
Middle Name	*No entry* The employee's middle name or initial.
Agency	*No entry* The agency code of the employing agency.

☞ **Note**   If the employee worked for more than one agency, the W–2 wages, taxes, etc., are cumulative. The current or last employing agency is displayed.

W2 Type   *No entry*
This field refers to employee type (regular or CETR). Valid values are**:**

    R   regular employee
    C   CETR employee

W2C Search Pop-up Field Instructions

The W2C Search pop-up (UU3002) (**Figure 8**) is used to search for a corrected W–2 when the employee's social security number is known. For instructions on this process, see **Searching For A W–2 Or W–2C (Corrected W–2)**.

Social Security Number   *Required, numeric, 9 positions*
Type the employee's social security number.

W2 Type   *Required*
Select one of the radio buttons to identify the type of corrected W–2 as defined below.

    Regular   A corrected W–2 for a Regular employee
    CETR   A corrected W–2 for a casual time employee

Field Descriptions/Instructions For WTWO Windows

W2 Inquiry Window Field Descriptions

The W2 Inquiry window (UU0801) (**Figure 9**) displays the data recorded on the employee's most current W–2. Only tax data for the last tax year is available for viewing. For instructions on this function, see **Viewing A Regular Or CETR W–2**. The fields displayed on this window are described below.

Employee   ∇

Identifies the employee for whom the W–2 was issued.

S S N   *No entry*
The employee's social security number.

Name   *No entry*
The employee's name.

W2 Type   *No entry*
Identifies the type of W–2 (regular or CETR) that was issued.

Gross Taxable Income   *No entry*
Amount of wages, tips, and other compensation paid to the employee.

Federal Tax Withheld   *No entry*
The amount of Federal income tax withheld.

Social Security Wages   *No entry*
The amount of wages subject to social security tax.

Social Security Tax   *No entry*
The amount of social security taxes withheld.

Medicare Wages   *No entry*
The amount of wages subject to Medicare tax.

Medicare Taxes   *No entry*
The amount of Medicare taxes withheld.

Agency Reported Tips   *No entry*
The amount of tips allocated to the employee by the employing organization. This amount is reported on the W–2.

Note   This amount is not included in the Gross Taxable Income field.

Employee Reported Tips   *No entry*
The amount of employee reported tips.

Note   This amount is not included in the Gross Taxable Income field.

Advance EIC Payment   *No entry*
The amount of advance earned income credit payments made to the employee.

Dependent Care Benefits   *No entry*
The amount of flexfund dependent care expense deductions.

Note   This amount is not included in the Gross Taxable Income field.

Benefits In Box1	*No entry*
	The amount of government-owned vehicle (GOV), chauffeur-driven vehicle, government-provided parking, and/or group-term life insurance that is taxable non-cash fringe benefit subject to tax withholding.

Taxable Life Insurance

No entry

The amount of taxable group-term life insurance.

401K TSP Non-Tax

No entry

The amount of Thrift Savings Plan deductions.

☞
Note

This amount is not included in the Gross Taxable Income field.

403B TIAA

No entry

The amount of Federal Deposit Insurance Corporation (FDIC) or Smithsonian Institution non-Federal Thrift Savings Plan deductions (Trust Fund Retirement Plan). Annual wages before the contributions are taken out are used for purposes of calculating social security tax, Medicare tax, and benefits.

☞
Note

This amount is not included in the Gross Taxable Income field.

COLA

No entry

The amount of cost-of-living allowance (COLA).

☞
Note

This amount is not included in the Gross Taxable Income field.

Non-Tax Health Benefits

No entry

The amount of nontaxable health insurance and/or the flexfund health care expense deductions not included in wages.

☞
Note

This amount is not included in the Gross Taxable Income field.

Moving Allow Tax CY

No entry

The amount of taxable moving allowance for the current tax year.

Moving Allow Non-Tax CY

No entry

The amount of nontaxable moving allowance paid in the current tax year.

☞
Note

This amount is not included in the Gross Taxable Income field.

Taxes

∇

The Taxes list box identifies the state, city, and county taxes that were withheld for the tax year. The fields displayed in this list box are described below.

Description

No entry

The description for the taxing entity.

Taxing Entity ID

No entry

The identification number for the taxing entity.

Amount

No entry

The amount of taxes withheld for the taxing entity.

👉 **Note**	Several taxing entities may be listed if taxes were withheld for more than one state, city, or county.

W2 Status   ∇

Identifies: (1) when the original W–2 was printed, (2) if an adjustment was made to the W–2, and (3) if a corrected W–2 exists for the employee.

W2 Printed On   *No entry*
The date the original W–2 was printed.

W2-C   *No entry*
Identifies that a corrected W–2 also exists for the employee.

👉 **Note**	If this field is marked, a corrected W–2 exists for the employee. Click [W2-C] to display the W2C Inquiry window (**Figure 11**). For an explanation of the data you are viewing on the W2C Inquiry window, see **W2C Inquiry Window Field Descriptions**.

Adjustment   *No entry*
Identifies that an adjustment has been made to the employee's original W–2.

👉 **Note**	If this field is marked, an adjustment was made to the original W–2.

Additional W2 Fields Pop-up Field Descriptions

The Additional W2 Fields pop-up (UU0804) (**Figure 10**) displays additional data recorded on the employee's most current W–2. Only tax data for the last tax year is available for viewing. For instructions on this function, see **Viewing Additional W2 Fields**. The fields displayed on this window are described below.

Travel Reimbursements   *No entry*
The amount of travel reimbursement.

TSP Deduction 401K   *No entry*
The amount withheld for the Federal Thrift Savings Plan (TSP).

Flexfund HCA   *No entry*
The amount of non-taxable flexfund health care expense withheld.

👉 **Note**	This amount is not included in the Gross Taxable Income field.

Maintenance Allow Non-Tax   *No entry*
The amount of non-taxable maintenance allowance paid to the employee.

👉 **Note**	This amount is not included in the Gross Taxable Income field.

Retirement Deductions   *No entry*
The amount withheld for retirement contributions.

Bond Refund Carryover	*No entry*
	The amount of bond carryover refund.
Parking Benefits	*No entry*
	The amount of non-taxable parking benefits withheld.

☞ **Note**   This amount is not included in the Gross Taxable Income field.

Transit Benefits	*No entry*
	The amount of non-taxable transit benefits withheld.

☞ **Note**   This amount is not included in the Gross Taxable Income field.

Quarters Tax	*No entry*
	The amount paid to the employee for quarters.
Quarters Allow Non-Tax	*No entry*
	The amount of non-taxable quarters allowance paid to the employee.

☞ **Note**   This amount is not included in the Gross Taxable Income field.

Travel Allowance	*No entry*
	The amount of travel allowance paid to the employee.
Horse Allowance	*No entry*
	The amount of horse allowance paid to the employee.
Quarters Allowance	*No entry*
	The amount of taxable quarters allowance paid to the employee.

W2C Inquiry Window Field Descriptions

The W2C Inquiry window (UU3001) (**Figure 11**) displays the data recorded on the employee's corrected W–2. For instructions on this function, see **Viewing A W–2C (Corrected W–2)**. The fields displayed on this window are described below.

Employee	∇
	Identifies the employee for whom the W–2C was issued for.
SSN	*No entry*
	The employee's social security number.
Name	*No entry*
	The employee's name.

∇

The Adjust W–2 Data list box identifies data that was corrected on the original W–2. The fields displayed in this list box are described below.

Field Descriptions/Instructions For WTWO Windows

Adjusted W2 Field Name	*No entry*
	The field on the W–2 that was corrected.
Originally Reported	*No entry*
	The original amount shown on the W–2 for the description in the Adjusted W2 Field Name field.
Correct Information	*No entry*
	The amount of adjustment made for each description displayed in the Adjusted W2 Field Name field. If the amount being adjusted is negative, the amount is shown with a minus (–) sign.
Difference	*No entry*
	The difference between the original and adjustment amounts. The Difference amount is the result of the **Original**, plus or minus the **Correct Information** amount.

Employee Detail Window Field Descriptions

The Employee Detail window (UU0401) (**Figure 12**) displays the employee's mailing address and other administrative information contained in the Payroll/Personnel System database. For instructions on this function, see **Viewing Employee Detail Data**. The fields displayed on this window are described below.

Employee Information	∇
	Identifies the employee by his/her social security number (SSN) and full name.
SSN	*No entry*
	The employee's SSN.
First Name	*No entry*
	The employee's first name.
Middle Name	*No entry*
	The employee's middle name or initial.
Last Name	*No entry*
	The employee's last name.

Mailing Address	∇
	Identifies the employee's mailing address
Mailing Address	*No entry*
	The employee's street mailing address.
City	*No entry*
	The city name for the employee's mailing address.

State *No entry*
The state abbreviation for the employee's mailing address.

ZIP Code *No entry*
The ZIP code for the employee's mailing address.

**Administrative
Information** ∇

Identifies the employee's personnel office, if the employee is currently active or separated, the employee's retirement coverage code, and agency.

**Personnel Office
Identifier** *No entry*
The personnel office identifier (POI) to which the employee is assigned.

**Separation
Accession Type** *No entry*
The separation accession type code. Valid values are:

0 not separated
1 regular separation
2 deceased
3 accession

**Retirement
Coverage Code** *No entry*
The employee's retirement coverage code. This field indicates the civilian retirement system, to which deductions from an employee's pay are credited, based on civilian employment by the U.S. Government or the District of Columbia. For a list of valid retirement coverage codes, see the Table Management System (TMGT), Table 025, AD-350, Personnel Block & Description.

Agency Code *No entry*
The agency code of the employing agency. If the employee worked for more than one agency, the W–2 wages, taxes, etc., are cumulative. The current or last employing agency is displayed.

**T&A Contact Point
Information** ∇

Identifies the employee's Time and Attendance Report (T&A) contact point currently established in the Payroll/Personnel System.

State Code *No entry*
The state code for the location of the employee's T&A contact point.

City Code *No entry*
The city code for the location of the employee's T&A contact point.

Unit Code *No entry*
The unit code for the location of the employee's T&A contact point.

Time Keeper
Code   *No entry*
                           The timekeeper code assigned for the person responsible for processing T&A for
                           the employee.

Duty Station Residence Pop-up Field Descriptions

The Duty Station Residence window (UU0803) (**Figure 13**) displays the
employee's duty station and residence information. For instructions on this
function, see **Viewing Duty Station and Residence Data**. The fields displayed on
this window are described below.

Duty Station   ∇

                          Identifies the location of the employee's duty station.

State   *No entry*
                          The state abbreviation for the employee's duty station.

County   *No entry*
                          The county name for the employee's duty station.

City   *No entry*
                          The city name for the employee's duty station.

Residence   ∇

                          Identifies the state, city, and county for the employee's residence address.

State   *No entry*
                          The state abbreviation for the employee's residence address.

County   *No entry*
                          The county name for the employee's residence address.

City   *No entry*
                          The city name for the employee's residence address.

Gross Pay   *No entry*
                          The gross pay amount for which the deduction of state, city, and county tax was
                          withheld.

Reference Tables

This section presents the following tables:

Departments Provided W–2's By NFC Table

ACTION – The National Volunteer Agency
Appalachian Regional Commission
Architect of the Capitol
Commission on Security and Cooperation in Europe
Commodity Futures Trading Commission
Congressional Budget Office
Copyright Royalty Tribunal
Corporation or National and Community Service
Department of Agriculture
Department of Commerce
Department of Education
Department of Housing and Urban Development
Department of Justice
Department of State
Department of the Treasury
Farm Credit Administration
Federal Communication Commission
Federal Deposit Insurance Corporation
Federal Emergency Management Agency
Federal Housing Finance Board
Federal Mediation and Conciliation Service
Federal Mine and Health Review Commission
General Accounting Office
Interagency Council on the Homeless
John C. Stennis Center for Public Service Training and Development
Library of Congress
Martin Luther King Holiday Commission
National Capital Planning Commission
National Endowment for the Arts
National Gallery of Art
National Labor Relations Board
Occupational Safety and Health Review Commission

Departments Provided W–2's By NFC Table

Office of Congressional Compliance
Office of Executive Secretariat
Office of Governmental Ethics
Office of Technology Assessment
Reading Is Fundamental
Small Business Administration
Smithsonian Institution
Treasury Contractors
Treasury Technical Assistance
U.S. Architectural and Transportation Barriers Compliance Board
U.S. Botanic Garden
U.S. Capitol Police
U.S. Commission on Civil Rights
U.S. Court of Veterans Appeals
U.S. Merit System Protection Board
U.S. Office of Special Counsel
U.S. Senate Restaurants
Woodrow Wilson International Centers for Scholars

Edit Messages Table

SSN Found
SSN Not Found - Verify SSN
Enter Only One Search Criteria
User Does Not Have Access To This Data
W–2 Not Found
W–2C Not Found
No Adjustment Found For Specified SSN
Employee Not Found

Heading Index

This index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.